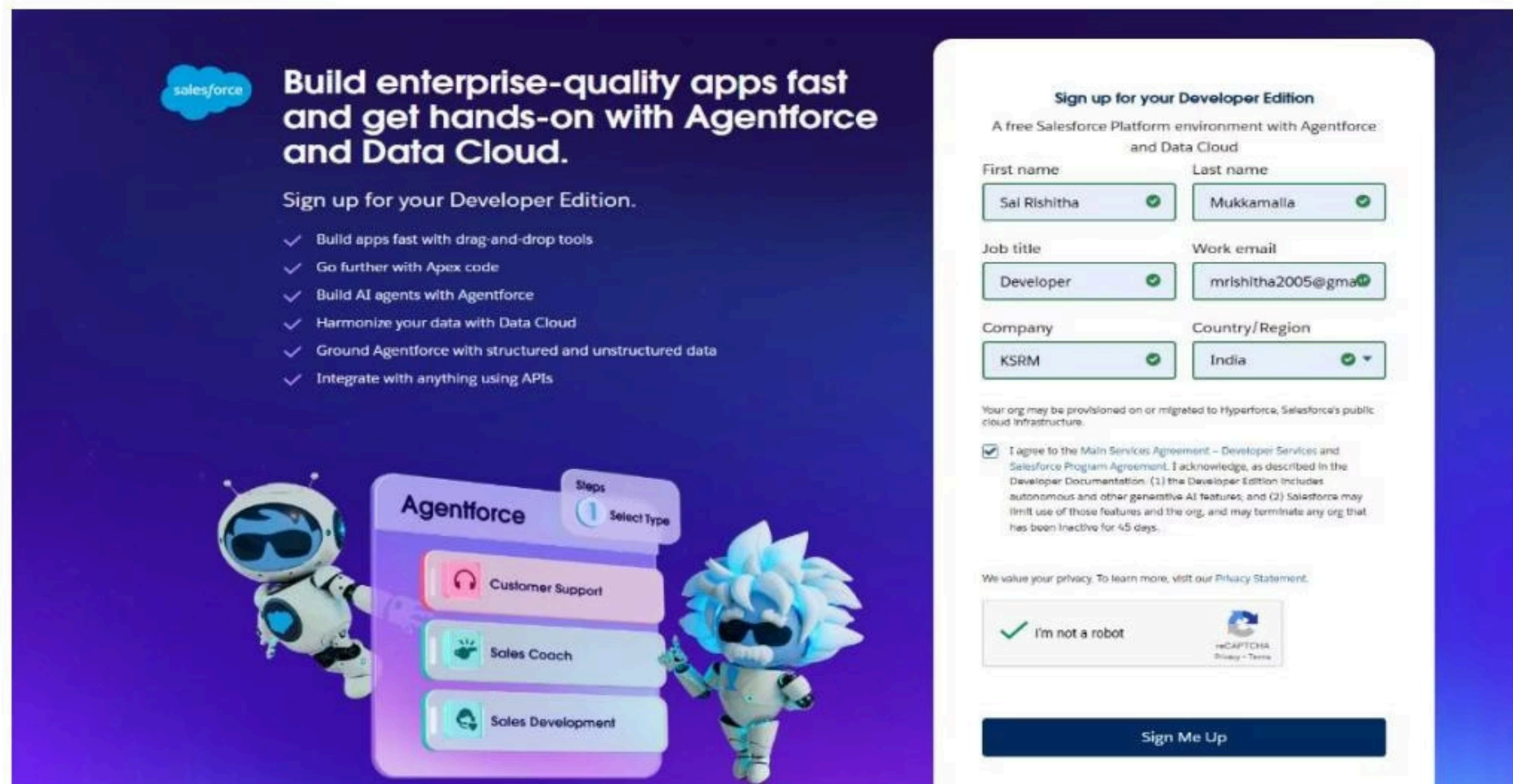# Phase 2: Org Setup & Configuration

Salesforce-Based Hotel Reservation & Management System

Step 1: Salesforce Editions

Where to check the Edition:

- ⬜ Login to your Salesforce Org.

- ⬜ Click on the Setup (Gear Icon) in the top-right corner.

- ⬜ From the left menu → Go to Company Settings → Company Information.

- ⬜ On this page, you will see the Salesforce Edition (e.g., Enterprise Edition, Developer Edition, Professional Edition).

Goal: Prepare Salesforce environment for the hotel system.

Salesforce Edition: Developer Org.

Step 2: Company Profile Setup

- 🔹 Go to **Setup → Company Settings → Company Information**
- 🔹 Entered details:

Company Name	Primary Contact	Address & Time Zone
Hotel Reservation System	Details filled	Set according to hotel location

Default Locale	Default Currency
English (US)	USD ($)
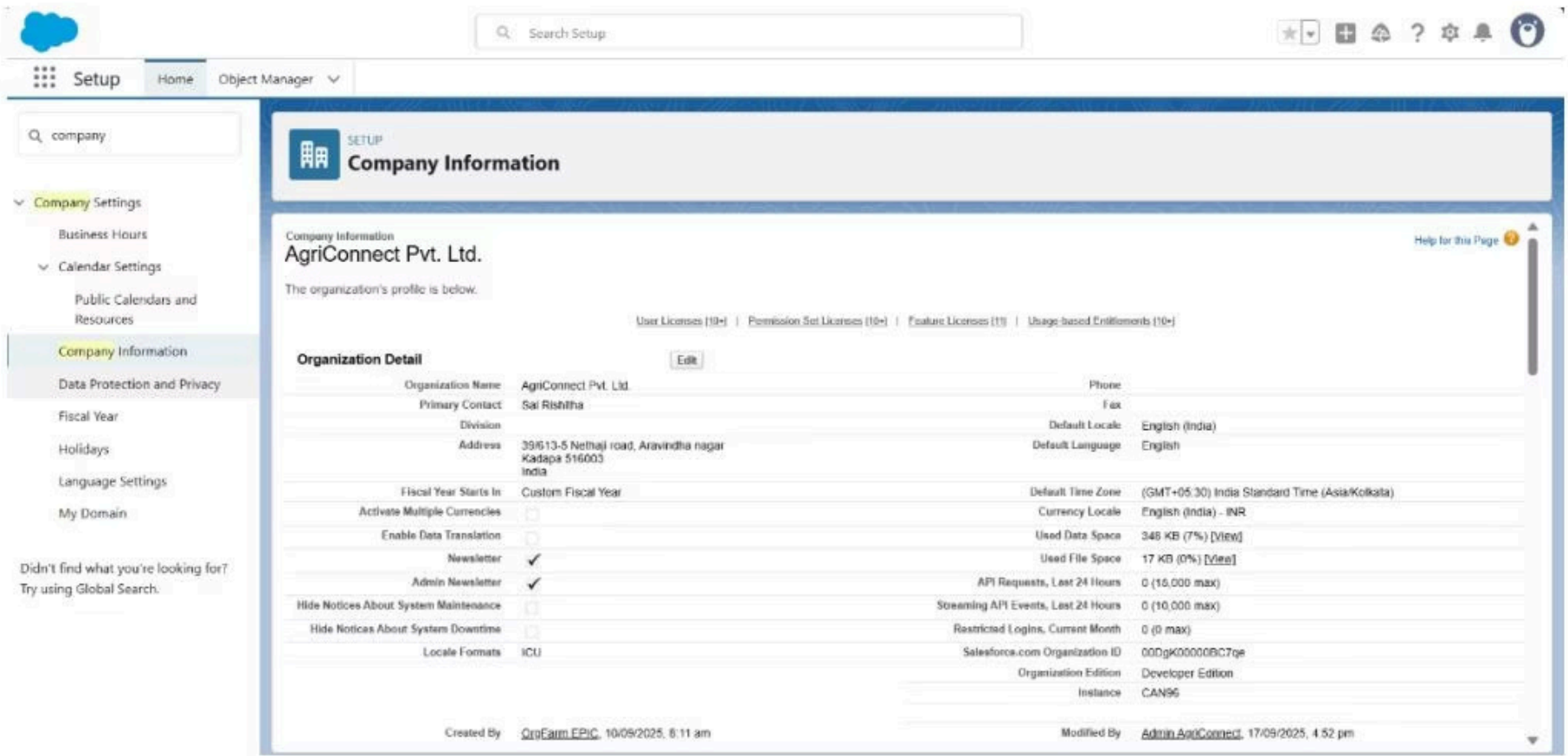
Company Profile Setup: Hotel information, time zone, currency.

Step 3: Business Hours & Holidays

- 🔹 Go to **Setup → Company Settings → Business Hours**

- 🔹 Created **Default Business Hours: 24x7 with defined shifts**
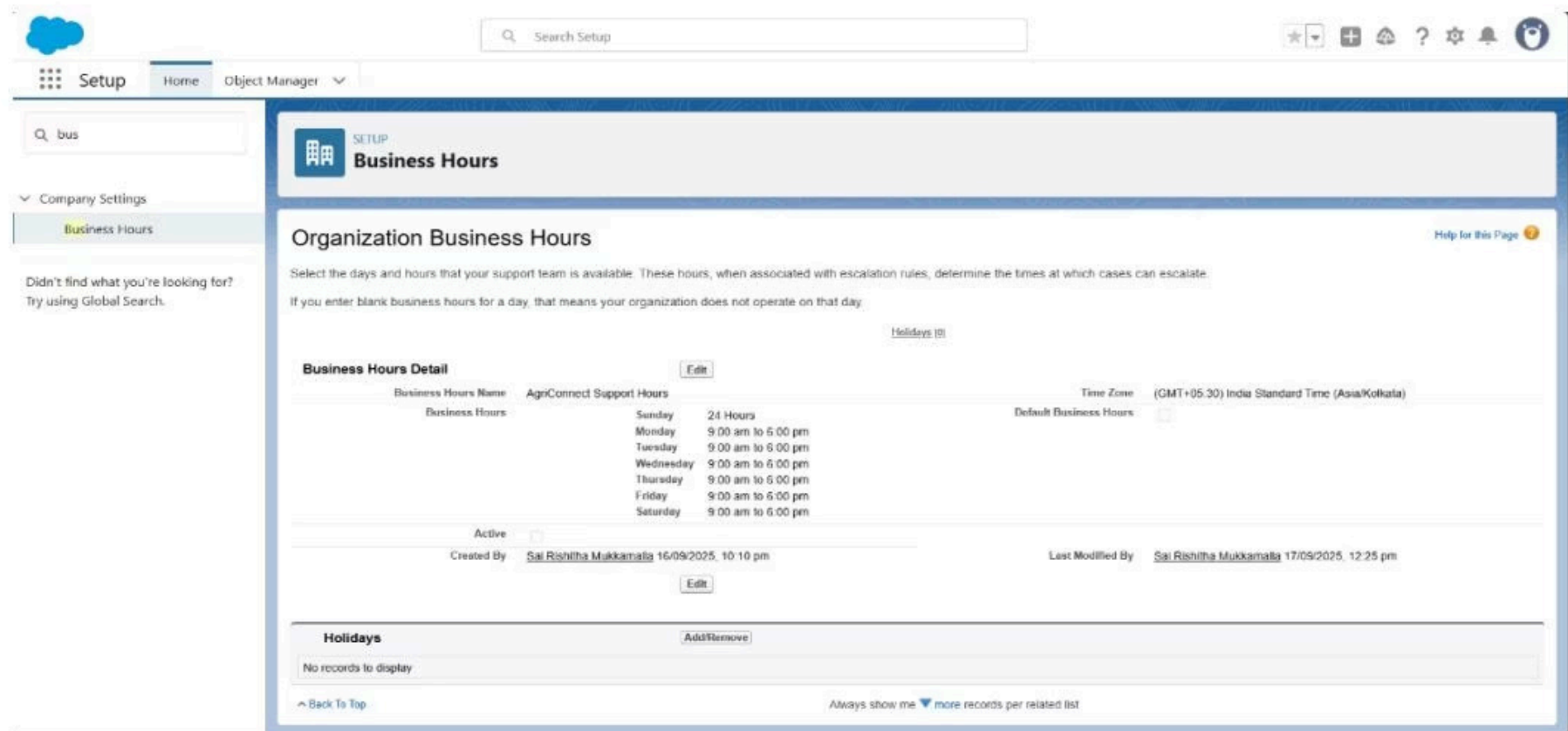
- 🔹 Added **Holidays** under **Setup → Holidays**:

- New Year's Day

- Independence Day

- Thanksgiving

- Christmas Day
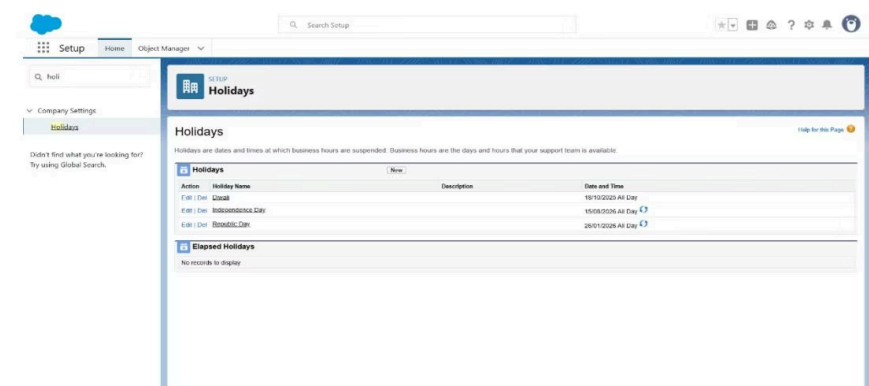
Business Hours: 24x7 with defined shifts.

Step 4: Fiscal Year Settings

- 🔲 Go to **Setup → Company Settings → Fiscal Year**

- 🔲 Selected **Standard Fiscal Year (January–December)**

- 🔲 Did not enable **Custom Fiscal Year**

Step 5: User Setup & Licenses

- 🔹 Go to **Setup → Users → Users → New User**
- 🔹 Created users:
- **First Name: Test | Last Name: Receptionist** → License: Salesforce Platform
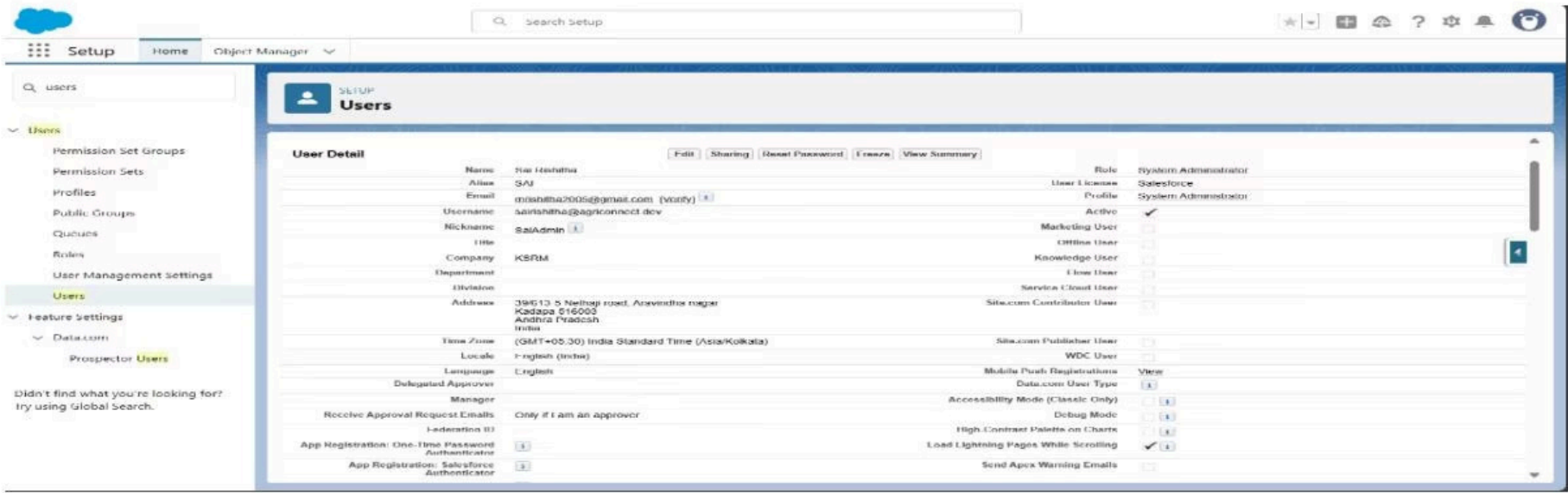
- **First Name: Test | Last Name: Manager** → License: Salesforce
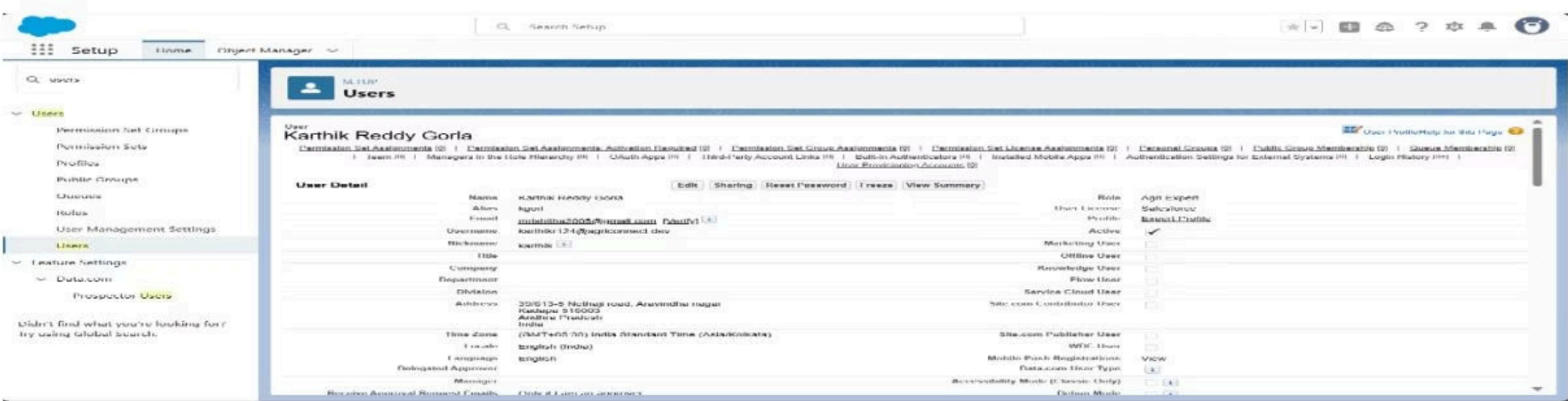
- **First Name: Test | Last Name: Housekeeping** → License: Salesforce Platform
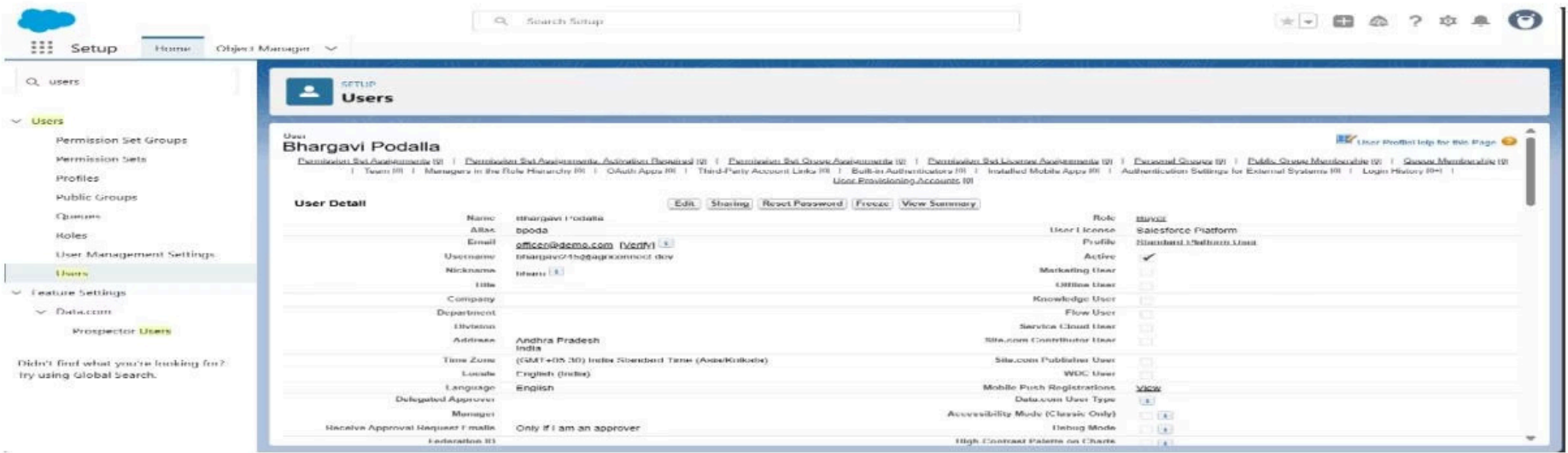
- **First Name: Test | Last Name: Guest** → License: Customer Community
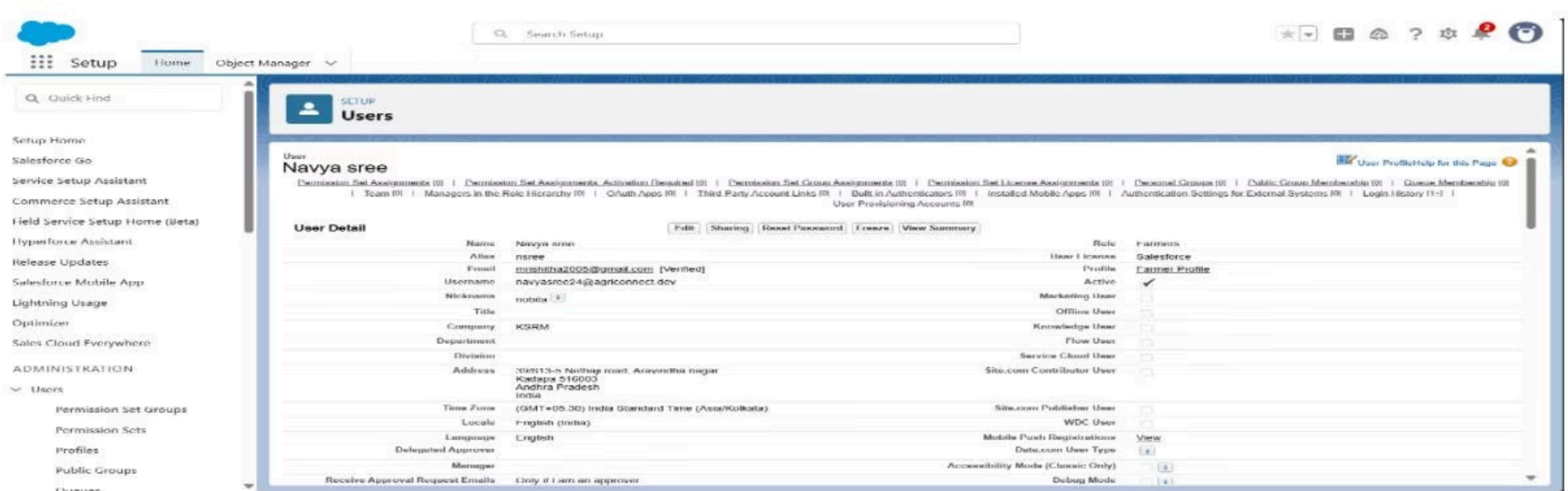
🔹 Assigned **Profiles** and **Roles** to each user

User Setup: Create Receptionist, Manager roles.

Custom Objects Created in Hotel System

After setting up users, I created **custom objects** to store and manage data related to hotel reservations, rooms, and guest management.

1. Room

Purpose: To store details of hotel rooms and their availability.

Key Fields: Room Number, Type, Rate, Status.

Used by: Receptionists (to check availability) & Managers (to manage inventory).

2. Reservation

Purpose: To manage hotel bookings and guest stays.

Key Fields: Check-in Date, Check-out Date, Total Amount, Guest ID, Room ID.

Used by: Receptionists (to create bookings) & Guests (to view reservations).

3. Payment

Purpose: To track payment transactions for reservations.

Key Fields: Amount, Method, Status, Reservation ID.

Used by: Receptionists (to process payments) & Managers (to track revenue).

4. Feedback

Purpose: To collect and manage guest feedback and ratings.

Key Fields: Guest, Rating, Comments, Service Type.

Used by: Guests (to provide feedback) & Managers (to monitor service quality).

Step 6: Profiles & Step 7: Roles
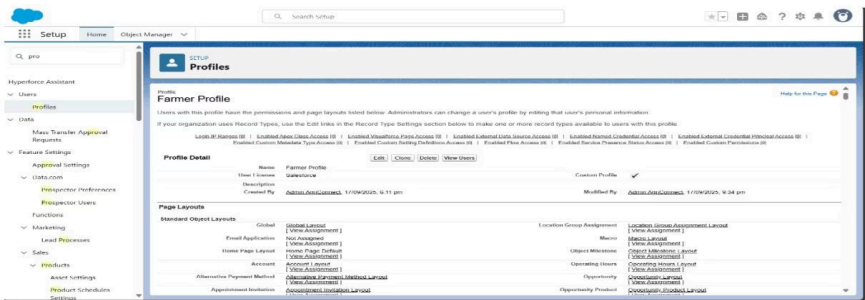
Profiles

- ⬜ Go to Setup → Profiles
- ⬜ Created/Configured Profiles:
- Receptionist Profile → Access only Reservations, Rooms

- **Manager Profile** → Full access to all hotel data
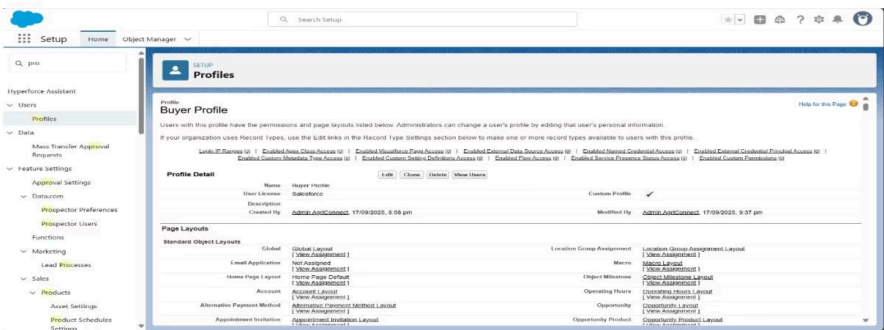
- **Guest Profile** → Access to own reservations and feedback

Profiles: Receptionist (create bookings), Manager (full access).
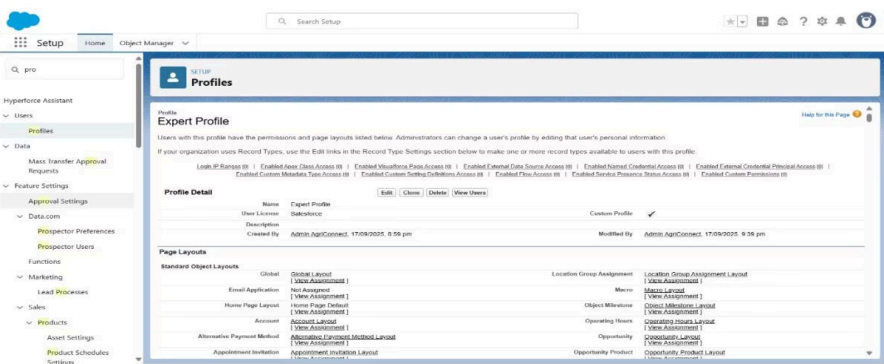
Roles

- ⬜ Go to **Setup → Users → Roles → Set Up Roles**
- ⬜ Configured hierarchy:
- **Hotel Manager (Top)**
- **Front Desk Supervisor (Reports to Manager)**
- **Receptionist (Reports to Supervisor)**
- **Guest (Lowest Level)**
- ⬜ Ensured managers can see all reservations in their hotel

Step 8: Permission Sets & Step 9: Organization-Wide Defaults

Permission Sets

- 🔲 Go to **Setup → Permission Sets**
- 🔲 Created:
- **ps_hotel_reports** → Extra report access
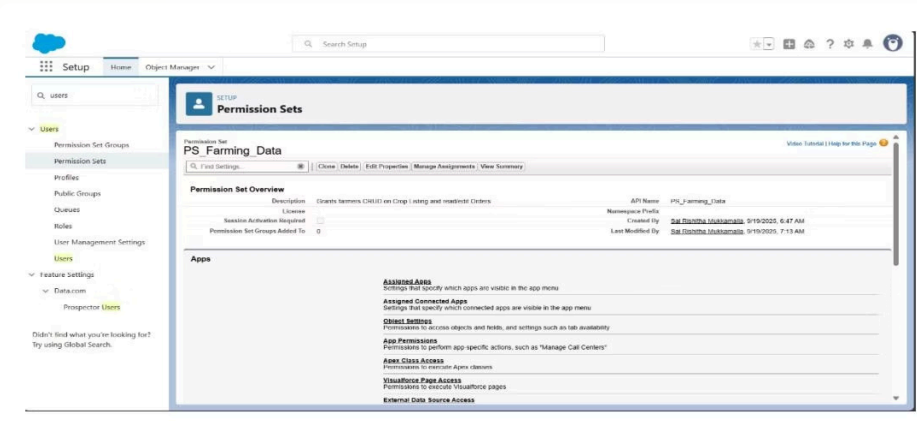

- **ps_ReceptionistAccess** → Extra permissions for Front Desk
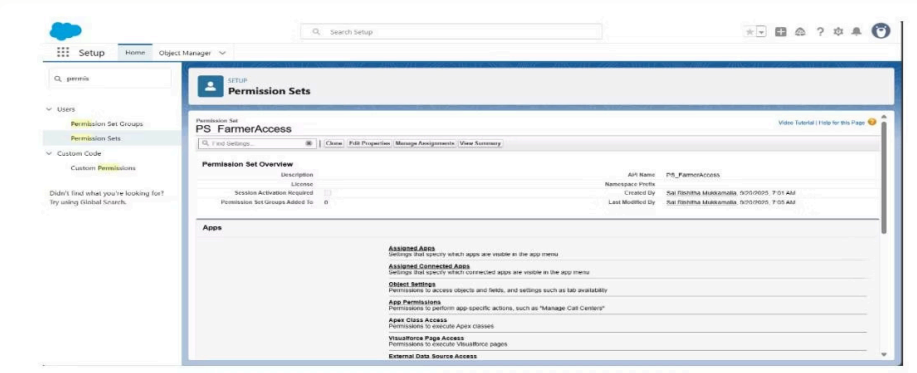
🔲 Assigned permission sets to specific users in addition to profiles
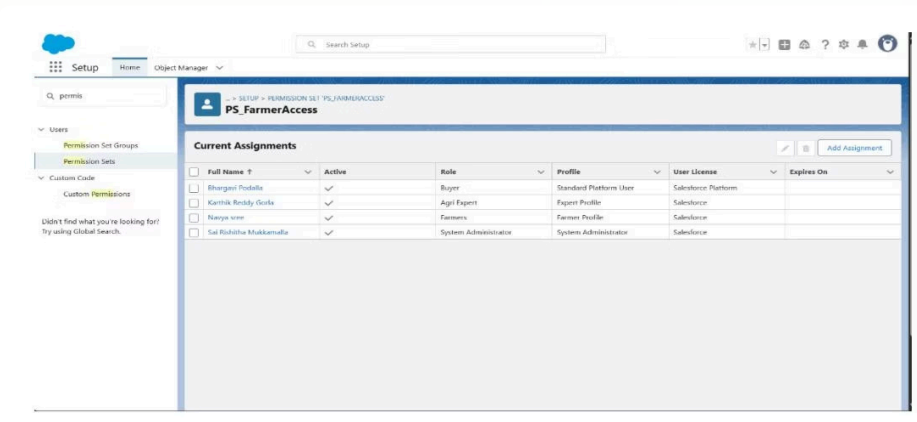
Permission Sets: Extra report access.

OWD: Rooms public read-only, Reservations private.

Organization-Wide Defaults (OWD)

- 🔲 Go to Setup → Security → Sharing Settings
- 🔲 Set OWD as:
- Rooms → Public Read-Only
- Reservations → Private
- Guest Details → Private
- 🔲 Ensures security of guest data

Step 10: Sharing Rules & Step 11: Login Access Policies

Sharing Rules

- ⬜ Go to **Setup** → **Security** → **Sharing Settings** → **Sharing Rules**
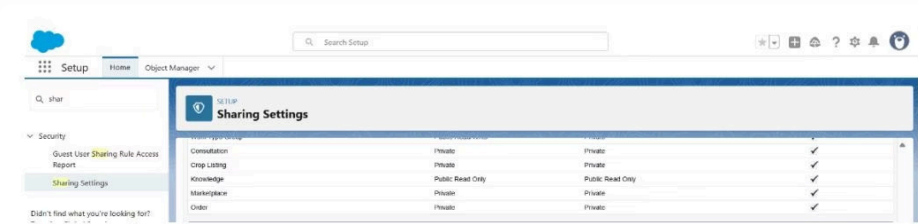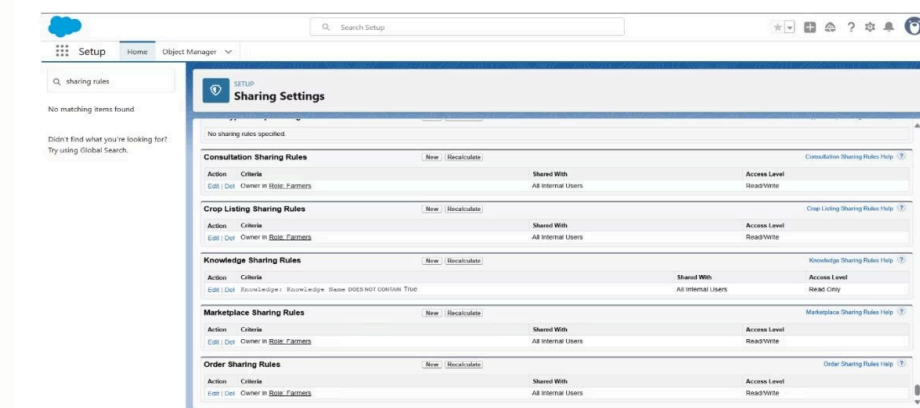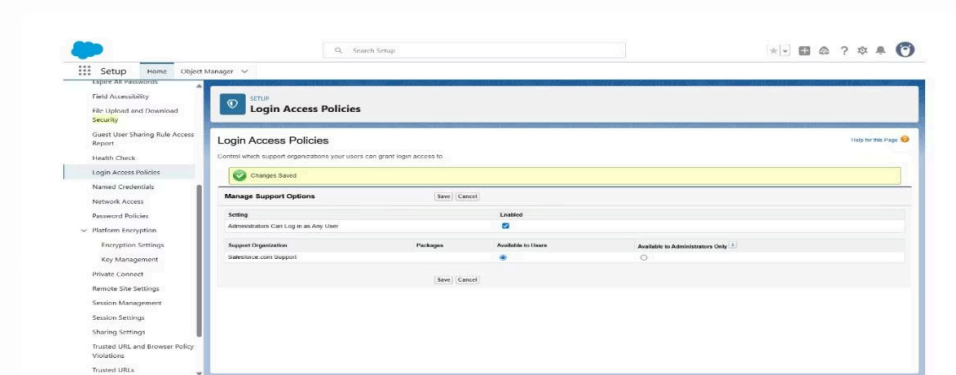- ⬜ Created rule:
- Share **Guest Reservation Records** → With **Hotel Managers** → Access: Read/Write
- ⬜ Created rule for **Room Data** → Shared with **All Receptionists**

Sharing Rules: Managers can see all bookings.

Login Access Policies

- ⬜ Go to **Setup** → **Security** → **Login Access Policies**
- ⬜ Enabled:
- **Admin Login Access** for troubleshooting
- **Business Hours Restriction** for selected users

Login Access Policies: Restrict by business hours.

Conclusion

In Phase 2 of the Hotel Reservation System, the Salesforce Org was successfully configured with essential settings. We set up the company profile, business hours, fiscal year, and created users, roles, and profiles to define access. Security was ensured through OWD, sharing rules, and permission sets. A sandbox and deployment setup were prepared for safe testing and migration. Finally, key custom objects (*Room, Reservation, Payment, Feedback*) were created to establish the core data model for comprehensive hotel management.

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